



Checklist for Getting Set Up with Emails

Start by evaluating the type of email service that is best for your long term needs

- ☐ I have an email service provider now and use it often – skip to next section
- ☐ Take a look at several ESPs and evaluate your future **needs**. **Sign up now** for (or switch to) the ESP of your choice and make a profile. Make sure your account is set up properly and ready to go. Call their customer support if you have any difficulties.
- ☐ Take a look at the tutorials that are offered by your ESP so that you can become familiar with the basics of their service and so that you can follow along in the steps we discuss in this course.

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Starting from scratch or restarting.

- ☐ Evaluate your existing customer lists. Email marketing is permission-based. Your ESP will set the parameters for the permissions they require for you to send emails to the people on your list. Some require “double opt-in” and others will not. This is a sample of possible lists
  - You might have lists of contacts in email folders
  - You might have business cards
  - You might have names written down of interested prospects
  - You might have a list of your customers
  - You might have a spreadsheet of names and emails
  - You might have very old lists in your program if you are restarting. You will need to put them into their own segmented list with a date of last send before adding new names. You will treat these as cold lists.
- ☐ I have more than one type of customer and will need to segment lists
- ☐ Study the Hierarchy Chart (in bonus materials) and list your segments and tags
- ☐ What tags might you use in your business?
- ☐ Contact your ESP if this step seems difficult or you have any questions

Bringing subscribers into your ESP program

- ☐ Organize lists for uploading to your ESP – it helps to put them in to a spreadsheet like excel or numbers as a CSV and format the columns to match your ESP’s forms. ESP will help with this.
- ☐ Do you have an email program like gmail, outlook, mail, etc? You can export your contacts if you want to use this as a list. Your ESP will show you how to upload this any lists from any source.